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Tree Nuts

Annual

2004

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Report Highlights:

Tree nut production is estimated lower in MY 2004. Hazelnut and pistachio production were affected by frosts in early spring. Hazelnut damage occurred in the eastern Black Sea region, which normally accounts for about 70 percent of total production. However, production in the western Black Sea region was higher than normal. Hazelnut production is currently estimated around 425,000 MT. Hazelnut export prices reached record high levels during the recent weeks. FISKOBIRLIK announced a record high procurement price, TL 5,050,000 per kilogram of Levant type hazelnuts (in shell). Exports in MY 2004 are estimated to decline due to smaller supplies.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Ankara [TU1]
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Executive Summary

Turkey had an unusual year for hazelnut production. Forecasts for MY 2004 were very favorable in early spring. Frosts in early April however, reversed all expectations. Temperatures dropped as low as -8 C especially in the hilly parts of the eastern Black Sea, which accounts for more than half of total production. Production estimates from traders and trade associations vary, from 329,000 MT to 500,000 MT. Small farm size, as well as the high variation in frost damage from farm to farm (influenced largely by farm altitude) are reasons for the variations in production estimates. Trade sources also indicate that FISKOBIRLIK, which cites relatively low production estimates, has an interest in supporting its members – all of whom are hazelnut producers – by providing the market low production estimates. As a result, these low estimates are largely disregarded.

FISKOBIRLIK did not procure many hazelnuts during the last two years. As a result, stocks are not available to support the shortfall. Industry sources indicate that low hazelnut production in two successive years only happens once in a hundred years. As a result, hazelnut prices increased dramatically in recent months reaching record highs, around USD 675 per 100 kilogram of natural whole kernels and USD 750 per 100 kilogram of roasted whole kernels. Stocks are virtually nonexistent at this point.

FISKOBIRLIK recently announced the procurement prices as TL 5,050,000 (or about USD 3.40) per kilogram for the majority of (Levant type in shell) MY 2004 crop hazelnuts. Giresun type, which had very low production in MY 2004, received a premium of TL 200,000 per kilogram and black oval and pointed hazelnuts received a deduction of TL 300,000 per kilogram. These are gross prices and the price farmers receive is calculated by deducting 11.6 percent tax and commission from these prices. Traders are expected to pay TL 200,000 or 300,000 per kilogram below the Fiskobirlik prices. As an Agricultural Sales Cooperative Union, Fiskobirlik is not obliged to purchase all of the hazelnuts offered by farmers. Likewise, it cannot expect any direct support from the Treasury and as such cannot operate at a loss (buying at high prices and selling at low prices to support farmers).

Turkey accounts for about eighty percent of world hazelnut trade. Export prices varied greatly in MY 2003. Export prices were around USD 225 per 100 kilogram for whole natural kernels at the beginning of the season. Prices remained low as FISKOBIRLIK sold its stocks of old-crop hazelnuts. As the season developed, export prices began to increase. Most exports were sold at around USD 400 per 100 kilogram. Export prices jumped after the frosts in early April. Current export prices were reported around USD 675 per 100 kilogram for whole natural kernels and USD 750 per 100 kilogram for roasted whole kernels. MY 2004 exports are expected to decline to 400,000 MT.

Following a record high year, pistachio production is estimated to be significantly lower in MY 2004 due to cyclical production and a severe spring frost, which also adversely affected production. A procurement price for pistachios is expected to be announced although significant quantities are not expected to be procured. Walnut consumption increased significantly in recent years because of the availability of low cost imported walnuts. Almond consumption declined due to supplies of inexpensive pistachios and walnuts in Turkey. The United States is the major supplier of almonds to Turkey.

There is a 43.2 percent duty on the CIF value of all types of in shell and shelled tree nut imports. The duty is 58.5 percent on processed tree nut product imports.

The current exchange rate is about USD 1.00 = TL 1,480,000 compared to TL 1,400,000 a year ago.

Production

Hazelnuts

MY 2005 (September 2005 – August 2006) hazelnut production is forecast to be higher than the current year as long as weather conditions remain normal. Increased area will contribute to production levels. Traders estimate that Turkey has the capability to produce 750,000 MT with good weather conditions. Production is currently forecast at 600,000 MT (in shell).

Early estimates for the 2004 crop were good with production possibly exceeding 700,000 MT. However, a frost in early April severely affected the crop particularly in the eastern Black Sea region. Most producers and traders agree that more than half of the production in that area was damaged. Orchards located in the higher elevations (300 meters and above) were especially hurt. This was partially offset by increases in the western Provinces, which was much higher than expected. The western provinces produce about 175,000 MT normally, but in 2004 production is estimated at about 275,000 MT. Similarly, eastern provinces produce about 450,000 MT, but the production is estimated at only 150,000 MT in MY 2004.

Estimates for total hazelnut production vary a lot. The Ministry of Agriculture estimates the production at 329,000 MT. FISKOBIRLIK estimates it at 358,000 MT. During a recent trip to the Black Sea, traders estimated production between 375,000 MT and 500,000 MT.

The GOT has been trying to reduce area for hazelnut production in order to avoid surpluses. With World Bank support, 580 hectares of land was taken out of production. However, this was offset by an increase in new orchards during the same period. Although there is a regulation limiting growing areas to land with a minimum 5% slope, area has increased during the last twenty years in all regions of the Black Sea. With little enforcement, area is expected to continue to increase due to favorable prices.

Turkey is the world's leading hazelnut producer, accounting for about 75 percent of world supply. Hazelnut production is primarily concentrated along Turkey's Black Sea coast, extending about 25 kilometers inland. The region is divided into three distinct growing areas: 1) the hilly region from Ordu to Trabzon, centered around Giresun, which in a normal year produces about 55 percent of the crop, 2) the flatter, mixed farming region west of Ordu to Samsun, which produces about 15 percent of the crop, and 3) the area west of Samsun, which produces the remaining 30 percent. Hazelnuts require relatively little effort to cultivate and therefore inputs are low. Harvesting occurs for several weeks in August.

Hazelnut production is the single most important industry in the Black Sea region. The total number of growers is estimated at about 400,000. There is no systematic crop-survey system but best estimates put total area at about 650,000 hectares, which is expected to grow slightly. Most eastern producers grow hazelnuts on 1 – 2 HA and use sales to supplement other income. There are only a few large growers (10 MT or more annually). On the other hand, most central and western farmers have 10 to 15 hectare orchards.

FISKOBIRLIK, which has 50 member cooperatives and about 246,000 member farmers and three sister companies for processing and marketing of processed products, is the most influential organization in the industry. Since the introduction of the direct income support program, sales cooperatives, like FISKOBIRLIK, are not allowed to procure commodities at a loss. Procurement is kept separate from processing and marketing to avoid losses.

Hazelnut yields vary between 700 and 1,500 kilograms per hectare depending upon location and fertility of the land. Yields are lower on hillsides and higher in the valley. Yields are also dependent on the age of the trees, which tend to be older (thus with a lower yield) in the

Eastern Black Sea Regions. Kernel or "meat" yield (in shell to shelled conversion) are not known yet, but are expected to be around 52-54 percent in MY 2004.

Nut quality is determined by type, oil and moisture content, and numbers of broken/shrunken kernels. Turkey produces three types of hazelnuts: Giresun, Levant, and Akcakoca. Giresun hazelnuts (round shape) are reputed to be the highest quality and have the best taste because of their higher oil content. Giresun hazelnuts are used generally in snack foods while Levant hazelnuts are sold as whole kernels or processed. As a rule, Giresun hazelnuts command a five percent premium over Levant varieties. Akcakoca hazelnuts are processed into paste. Kernel size and moisture content are also measures of quality. Standard #1 is 13-15 mm, #2 is 11-13 mm, and #3 is 9-11 mm.

FISKOBIRLIK announced the MY 2004 procurement prices on August 6, 2004 with Giresun nut receiving TL 5,250,000 (or about USD 3.55) per kilogram, Levant receiving TL 5,050,000 (or about USD 3.40) per kilogram and Akcakoca receiving TL 4,750,000 (or about USD 3.20) per kilogram. The majority of the hazelnuts produced in Turkey are Levant type (about 75 percent in a normal year). These prices are almost a hundred percent higher than the base price announced a year ago (TL 2,500,000 or about USD 1.78 per kilogram). However, FISKOBIRLIK paid additional TL 550,000 per kilogram to farmers after market prices went up last year. The Director General of FISKOBIRLIK stated recently that the prices for MY 2004 are gross prices. Most farmers will receive TL 4,464,000 per kilogram for Levant type after tax and other deductions (a total of 11.6 percent). Traders will be offering TL 200,000 - TL 300,000 per kilogram less than FISKOBIRLIK. Buying is scheduled to begin after August 20, 2004. FISKOBIRLIK is not required to procure the entire crop from its members. Instead, by announcing a closing date for buying FISKOBIRLIK can limit the quantity it procures and also can make payments in cash. (All prices are in shell.)

Aflatoxin is a major industry concern. However, due to changes in harvesting, there were reported to be no problems in the 2003 crop and none is expected for the 2004 crop. The Hazelnut Promotion Group (HPG) is financing aflatoxin research in Turkish hazelnuts. The HPG, with representatives from the Black Sea and Istanbul Exporters Union and officials from the Foreign Trade Undersecretariat is responsible for domestic and foreign promotion and research and development. Exporters finance HPG activities with funds from sales.

Pistachios

Pistachio production is highly cyclical and can vary a great deal. MY 2004 was expected to be a poor year because Turkey had record production in MY 2003. In addition, frosts affected production. MY 2004 production has been lowered to 30,000 MT. MY 2005 production is projected to be approximately 75,000 MT. MY 2003 production was revised slightly downward based on new industry information.

GUNEYDOGUBIRLIK, which is a sales cooperative, procured 1,700 MT of pistachios at TL 3,000,000 per kilogram in MY 2003. Although pistachio production was high and prices low, GUNEYDOGUBIRLIK bought only a very small proportion of the crop because of financial difficulties. GUNEYDOGUBIRLIK announced its price two months after the harvest was completed and stopped buying shortly after. GUNEYDOGUBIRLIK did not receive any financial assistance from the GOT. Last year's in-shell crop is currently priced at TL 5,500,000 a kilogram in Gaziantep. No prices have been announced for the 2004 crop.

Pistachios are mainly produced in the Southeastern Anatolia Region. Official data indicate continued production increases in the Southeastern Anatolia, where pistachios are replacing olive trees. Sanliurfa province has about twice as many trees as Gaziantep, the traditional growing area. Turkish pistachios are thinner and smaller than Iranian pistachios. Siirt pistachios are similar to Iranian pistachios, although the shape is different. Siirt pistachios,

about 15 percent of the total production, are bigger and command higher prices on the market than the traditional Turkish pistachios. In Turkey size is directly related to quality: 90 nuts or less per 100 grams is considered first quality, 90-100 nuts are second quality, 100-120 nuts are third quality, and above 120 nuts are fourth quality.

Walnuts

Walnuts grow throughout most of Turkey. During the past two decades, increased demand and good prices have encouraged walnut cultivation. The Horticultural Research Institute (HRI) in Yalova is the leading walnut research facility in Turkey. Higher yielding varieties have been developed in this institute although only a few of these varieties have been planted commercially. Several private companies have also begun commercial propagation of improved walnut varieties.

Due to increased trees and better varieties, production is expected to increase. Most private sources believe that production in any year is around 70,000 MT (in shell basis at a conversion factor of 1:2.5). The lack of systematic crop survey makes it difficult to accurately estimate the crop. Production in MY 2004 is estimated at 68,000 MT due to unfavorable weather conditions.

Almonds

Almonds are a minor crop in Turkey. Even though they are grown throughout the country, production is concentrated in the Aegean, Marmara, and Mediterranean Regions. Almonds were not cultivated as a commercial crop until recently. Variety selection during the past 25 years has resulted in an improvement of local varieties. Almond production is estimated to be slightly lower at 13,000 MT in MY 2004, due to unfavorable weather conditions. PSD production estimates are based on shelled basis at a conversion factor of 1:3.

Consumption

Hazelnuts

Processors and traders purchase most hazelnuts. The five largest processors/traders account for over 40 percent of the consumption, even though there are approximately 350 processors/traders in Turkey. Most of the industry is not vertically integrated. There are approximately 170 hazelnut crackers in Turkey with a total capacity of 1.25 MMT (in shell), while the 20 largest processors have a total capacity of 300,000 MT (in shell). Most hazelnuts are exported, or processed for export.

Hazelnuts are also a popular snack food in Turkey and the majority are consumed as whole nuts. With the devaluation of the Turkish Lira and availability of large quantities of hazelnuts, hazelnut prices encouraged consumption in recent years. Industry sources estimated the domestic consumption at around 80,000 MT (in shell), as both snack food and for confectionary. FISKOBIRLIK also crushed older crops for oil, which added to consumption. This year, FISKOBIRLIK does not have large quantities of stocks. In addition, high prices may reduce the consumption significantly. The current retail price for shelled roasted hazelnuts in Ankara is about TL 18,000,000 (about USD 12.20) per kilogram. Retail prices were about TL 10,000,000 per kilogram in 2002 and 2003. The rate of inflation for the last twelve months was around 9 percent.

Pistachios

Pistachios are a popular snack food and are also used in making pastries and sweets in Turkey. Pistachios even find their way into sausages in Turkey. Most of the crop is consumed domestically and consumption varies on the supply.

Currently, the retail price for in shell, roasted Gaziantep pistachios is around TL 15,000,000 (or about USD 10.14) per kilogram. This price is only slightly higher than the price at the

beginning of MY 2003. However, the MY 2003 price decreased dramatically due to record production. At one point, roasted pistachios were priced at about TL 8,000,000 per kilogram in Ankara. Carry-over stocks were reduced significantly as these prices stimulated consumption.

Walnuts

Per capita walnut consumption increased recently due to the availability of inexpensive imported walnuts. It is estimated that about fifty percent of domestic production is used for home consumption and the remainder is marketed commercially. Most walnuts are consumed directly. Retail prices for shelled walnuts vary a lot due to quality differences. It is possible to buy walnuts as low as TL 10,000,000 (or about USD 6.75) a kilogram, however, good quality domestically grown walnuts are sold at about TL 20,000,000 (or about USD 13.50) a kilogram in the retail market in Ankara.

Almonds

The availability of inexpensive pistachios and walnuts reduced almond consumption slightly in MY 2003. Reduced almond consumption is expected to continue in MY 2004 and MY 2005. Almonds are generally consumed whole as a snack food and only limited amounts are used in confectionary products. The retail price of shelled sweet roasted almonds in Ankara is about TL 25,000,000 (or about USD 16.90) a kilogram. As almonds are still more expensive than hazelnuts, there is not expected to be significant substitution from hazelnuts to almonds as a snack food.

Trade

Hazelnuts

Turkey accounts for about eighty percent of world hazelnut trade. Export prices varied greatly in MY 2003. Export prices were around USD 225 per 100 kilogram for whole natural kernels at the beginning of the season. Prices remained low as FISKOBIRLIK eliminated stocks. As the season developed, export prices began to increase. Most exports were sold at around USD 400 per 100 kilogram. Export prices jumped after the frosts in early April. Current export prices were reported around USD 675 per 100 kilogram for whole natural kernels and USD 750 per 100 kilogram for roasted whole kernels.

The European Union is the major market for Turkish hazelnuts. Shipping by trucks on a CIF basis is becoming more popular in recent years with most sales made to traders. About seventy percent of Turkey's hazelnut exports are raw kernels and remaining processed, including roasted, sliced, chopped, paste, meal, and flour. Very few hazelnuts are exported as finished consumer confectionary items. The trend, however, is to move from raw kernel exports to processed and finished products for value added.

In addition to a shift in the export product mix, Turkey is also hoping to expand its market presence in the Far East, Former Soviet Union, and the United States. Industry representatives in Turkey closely monitor the U.S. hazelnut and almond industry.

Official trade data for hazelnuts for MY 2003 is not available. According to data from the Black Sea Exporters Union, Turkey exported 214,656 MT of hazelnuts (shelled basis) from September 1, 2003 through August 6, 2004. Exports for corresponding period was 251,345 MT in MY 2002 and 252,035 MT in MY 2001. The total value for the exports was USD 864 million in MY 2003, compared to USD 580 million in MY 2002 and USD 627 million in MY 2001. MY 2004 exports are projected to be lower at 400,000 MT due to short supply, although they may generate more revenue due to high prices.

The Export Trade Matrix for hazelnuts represents unofficial data received from the Black Sea Exporters Union.

Pistachios

Turkey exports only a small proportion of its production, mainly to the EU and the United States. Exports in MY 2004 are expected to be lower due to lower supply and higher prices.

Walnuts

Walnut trade is conducted primarily with neighboring countries. Imports are from Central Asian countries and exports to the Middle East.

Almonds

Total almond imports declined slightly in MY 2003 due to the availability of inexpensive pistachios and walnuts. It is also projected that imports will remain low in MY 2004 and MY 2005. While total almond imports are relatively stagnant, the United States has been capturing a larger market share. In previous years, U.S. almond exports may have reached Turkey through third countries. Currently, U.S. Trade Data indicate that U.S. almond exports are at record levels. Turkish almond exports are few and sold mainly to the Middle East and EU.

Stocks**Hazelnuts**

Current hazelnut stocks are at minimal levels. FISKOBIRLIK bought about 8,000 MT of hazelnuts (in shell) in MY 2003 and sold all of it in recent months. The entire 2002 crop has been sold. Most of the 2001 stocks were also sold in recent months. FISKOBIRLIK may have around 25,000 MT of stocks, the quality of which is not known and expected to be low. Some traders bought some of the FISKOBIRLIK stocks to hedge themselves and there may be stocks at some processing facilities. Farmers may still have some stocks from the MY 2003 crop. FISKOBIRLIK's crushing hazelnuts for oil will be minimized in MY 2004 and will be zero in MY 2005 due to high prices and low stocks.

Pistachios, Walnuts, and Almonds

Data on pistachio, walnut, and almond stocks are not available. Pistachio stocks vary a lot from one year to another depending on supply. Due to the large production in MY 2003, there are large quantities (estimated around 40,000 MT) going into MY 2004 as carry-over stocks. Walnut and almond stocks also vary a lot due to the market conditions. Stocks usually represent around 10-20 percent of the production.

Policy**Production Policy****Hazelnuts**

In order to reduce surpluses, the GOT, with help from the World Bank, tried to decrease the growing area by promoting alternative crops and direct income support for farmers. While 580 hectares of hazelnut orchards were planted with other crops, this was offset by expansion in other areas due to high revenues from hazelnuts compared to most other crops. The industry is concerned that increases will create surpluses and depress prices in the near future. According to a Turkish Law, hazelnuts may be grown only in the hilly sides, with a minimum five percent slope, in the Black Sea region. Hazelnut growing areas, however, increased during the last two decades. Current high prices are expected to hamper any efforts to reduce hazelnut acreage.

Pistachios

In keeping with the government's liberalization program to privatize marketing channels, the GOT stopped direct support and allowed GUNEYDOGUBIRLIK to announce a support price, which more closely reflected market conditions. GUNEYDOGUBIRLIK only procured 1,700 MT in MY 2003, which was a record high production year. GUNEYDOGUBIRLIK is planning to

announce a procurement price in MY 2004 however, it is not clear whether GUNEYDOGUBIRLIK can buy any pistachios, since the market prices are expected to be high.

Walnuts and Almonds

Walnuts and almonds are not considered important commercial crops and receive no government support. There also have no producer associations or marketing cooperatives.

Trade Policy

Hazelnuts

FISKOBIRLIK recently announced a high price for procurement. Traders have complained that the announced price will reduce exports. They claim that international hazelnut users will be looking for other suppliers, such as Italy and/or begin searching for other substitutes, such as almonds and peanuts. Other traders claim that the substitution of almonds and peanuts for hazelnuts will be limited and most companies will be buying hazelnuts even at the high prices. If these industries do seek substitutes in the long term, it will mean fewer exports and larger stocks.

The export tax for whole shelled hazelnuts remains at USD 10 per 100 kilograms. There is no export tax on exports of processed hazelnut products.

Pistachios, Walnuts, and Almonds

There is no subsidy, tax, or other restriction on pistachio, walnut, and almond exports. Importers pay a 43.2 percent duty on the CIF value of all types of tree nuts and a 58.5 percent duty on all processed tree nut products.

Marketing

Turkey's Market Promotion Activities

Turkey hopes to expand its hazelnut markets, mainly in the Far East, especially in Japan and China, in addition to efforts to shift its export product mix. Most export commodities are represented by an Exporters Union in Turkey under the Undersecretariat of Foreign Trade. Members, which are mostly private traders, provide operating capital. There are two hazelnut exporters unions; the largest is being the Black Sea Exporters Union, which is located in Giresun, and one is in Istanbul. GUNEYDOGUBIRLIK in Gaziantep is the sole exporter union for pistachios. The unions follow domestic and trade issues, provide information, conduct market studies, and sponsor promotional events.

Statistical Tables

PSD Table for Hazelnuts

Turkey Filberts, Inshell Basis							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2003		09/2004		09/2005	MM/YYYY
Area Planted	0	0	0	0	0	0	HA
Area Harvested	0	0	0	0	0	0	HA
Bearing Trees	283000	285000	282000	286000	0	287000	1000 TREES
Non-Bearing Trees	11000	12000	10000	12000	0	13000	1000 TREES
Total Trees	294000	297000	292000	298000	0	300000	1000 TREES
Beginning Stocks	170000	160000	70000	60000	40000	35000	MT
Production	500000	480000	600000	425000	0	600000	MT
Imports	0	0	0	0	0	0	MT
TOTAL SUPPLY	670000	640000	670000	485000	40000	635000	MT
Exports	450000	440000	480000	400000	0	450000	MT
Domestic Consumption	150000	140000	150000	50000	0	80000	MT
Ending Stocks	70000	60000	40000	35000	0	105000	MT
TOTAL DISTRIBUTION	670000	640000	670000	485000	0	635000	MT

Export Trade Matrix for Hazelnuts

Export Trade Matrix Turkey Filberts, Inshell Basis			
Time Period		Units:	Metric Tons
Exports for:	Jan. - Dec. 2003		Jan. - July 2004
U.S.	14850	U.S.	3590
Others		Others	
Germany	133871	Germany	64977
Italy	60388	France	22627
France	42341	Italy	14599
Belgium	28608	Belgium	12844
Netherlands	24645	Netherlands	10636
Switzerland	18095	Switzerland	9516
United Kingdom	13806	Spain	7499
Austria	13502	United Kingdom	6679
Spain	12653	Austria	6384
Poland	7892	Russia	5915
Total for Others	355801		161676
Others not Listed	71224		39871
Grand Total	441875		205137

PSD Table for Pistachios

Turkey Pistachios, Inshell Basis							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		10/2003		10/2004		10/2005	MM/YYYY
Area Planted	0	0	0	0	0	0	HA)
Area Harvested	0	0	0	0	0	0	HA)
Bearing Trees	28000	28000	28000	28000	0	28000	1000 TREES
Non-Bearing Trees	15500	15500	15000	15000	0	15000	1000 TREES
Total Trees	43500	43500	43000	43000	0	43000	1000 TREES
Beginning Stocks	3000	3000	41000	40000	48000	25000	MT
Production	100000	90000	70000	30000	0	75000	MT
Imports	0	0	0	0	0	0	MT
TOTAL SUPPLY	103000	93000	111000	70000	48000	100000	MT
Exports	7000	6000	8000	3000	0	8000	MT
Domestic Consumption	55000	47000	55000	42000	0	52000	MT
Ending Stocks	41000	40000	48000	25000	0	40000	MT
TOTAL DISTRIBUTION	103000	93000	111000	70000	0	100000	MT

Export Trade Matrix for Pistachios

Export Trade Matrix Turkey Pistachios, Inshell Basis			
Time Period		Units:	Metric Tons
Exports for:	Jan. - Dec. 2003	Jan. - June	2004
U.S.	703	U.S.	263
Others		Others	
Germany	1564	Germany	618
Italy	474	Italy	296
Greece	467	Greece	254
Netherlands	393	Israel	118
Spain	209	Spain	104
Israel	153	Belgium	90
Sweden	140	France	85
United Kingdom	88	Netherlands	81
Belgium	86	Saudi Arabia	57
France	75	United Kingdom	44
Total for Others	3649		1747
Others not Listed	939		334
Grand Total	5291		2344

PSD Table for Walnuts

Turkey Walnuts, Inshell Basis							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2003		09/2004		09/2005	MM/YYYY
Area Planted	0	0	0	0	0	0	HA
Area Harvested	0	0	0	0	0	0	HA
Bearing Trees	3575	3575	3650	3650	0	3700	1000 TREES
Non-Bearing Trees	1500	1500	1800	1800	0	1800	1000 TREES
Total Trees	5075	5075	5450	5450	0	5500	1000 TREES
Beginning Stocks	11000	11000	8500	13500	8000	9000	MT
Production	69000	69000	70000	68000	0	72000	MT
Imports	6000	24000	8500	18000	0	18000	MT
TOTAL SUPPLY	86000	104000	87000	99500	8000	99000	MT
Exports	500	800	500	500	0	500	MT
Domestic Consumption	77000	89700	78500	90000	0	90000	MT
Ending Stocks	8500	13500	8000	9000	0	8500	MT
TOTAL DISTRIBUTION	86000	104000	87000	99500	0	99000	MT

Export Trade Matrix for Walnuts

Export Trade Matrix Turkey Walnuts, Inshell Basis			
Time Period		Units:	Metric Tons
Exports for:	Jan. - Dec. 2003		Jan. - June 2004
U.S.	18	U.S.	
Others		Others	
Bulgaria	299	Egypt	54
Iraq	33	France	38
Tunisia	27	Northern Cyprus	11
Northern Cyprus	15	Algeria	7
Germany	11	Iraq	3
Algeria	11	Switzerland	3
Lebanon	10	United Kingdom	2
Switzerland	9	Lebanon	2
Netherlands	8	United Arab Em.	1
United Kingdom	4	New Zealand	1
Total for Others	427		122
Others not Listed	152		19
Grand Total	597		141

Import Trade Matrix for Walnuts

Import Trade Matrix Turkey Walnuts, Inshell Basis			
Time Period		Units:	Metric Tons
Imports for:	Jan. - Dec. 2003		Jan - July 2004
U.S.	740	U.S.	900
Others		Others	
Ukraine	5288	Romania	6909
Uzbekistan	3713	Ukraine	2378
Romania	3562	Bulgaria	1615
Kyrgyzstan	3065	Kyrgyzstan	659
Moldova	1370	Moldova	369
Bulgaria	1272	Uzbekistan	209
Afghanistan	308	Iran	62
Romania	287	Tajikistan	44
Poland	40	Russia	15
Kazakhstan	34		
Total for Others	18939		12260
Others not Listed	20		
Grand Total	19699		13160

PSD Table for Almonds

Turkey Almonds, Shelled Basis							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2003		09/2004		09/2005	MM/YYYY
Area Planted	0	0	0	0	0	0	HA
Area Harvested	0	0	0	0	0	0	HA
Bearing Trees	3600	3600	3575	3575	0	3575	1000 TREES
Non-Bearing Trees	550	550	550	550	0	525	1000 TREES
Total Trees	4150	4150	4125	4125	0	4100	1000 TREES
Beginning Stocks	2500	2500	2400	2500	2000	2000	MT
Production	13700	13700	13700	13000	0	13300	MT
Imports	3000	1800	3000	2000	0	2000	MT
TOTAL SUPPLY	19200	18000	19100	17500	2000	17300	MT
Exports	500	500	500	500	0	500	MT
Domestic Consumption	16300	15000	16600	15000	0	15000	MT
Ending Stocks	2400	2500	2000	2000	0	1800	MT
TOTAL DISTRIBUTION	19200	18000	19100	17500	0	17300	MT

Export Trade Matrix for Almonds

Export Trade Matrix Turkey Almonds, Shelled Basis			
Time Period		Units:	Metric Tons
Exports for:	Jan. - Dec. 2003		Jan. - June 2004
U.S.	1	U.S.	
Others		Others	
Germany	109	Germany	93
Egypt	79	Egypt	61
France	47	France	46
Romania	39	Romania	31
Libya	28	Libya	28
Saudi Arabia	26	Netherlands	17
Russia	26	Italy	10
Netherlands	18	Russia	10
Italy	10	Algeria	5
Sweden	6	Saudi Arabia	3
Total for Others	388		304
Others not Listed	36		16
Grand Total	425		320

Import Trade Matrix for Almonds

Import Trade Matrix Turkey Almonds, Shelled Basis			
Time Period		Units:	Metric Tons
Imports for:	Jan. - Dec. 2003		Jan. - June 2004
U.S.	1314	U.S.	1318
Others		Others	
Germany	100	Germany	86
Northern Cyprus	3	Northern Cyprus	1
Spain	1		
Total for Others	104		87
Others not Listed			
Grand Total	1418		1405